

HOUSING INTAKE TEMPLATE

This Housing Intake Guide can be used by service providers during intake. Your organization can feel free to adapt this sample material to best fit your work.

Note to Staff

It is common that not all information will be disclosed during the introductory meetings, nor should this be an expectation. Rather content will be shared over time as you establish trust with the survivor. Be open and honest with survivors about what you can and cannot provide to them and about the limits of confidentiality you are able to maintain. Ensure you are aware of local, state, and federal parameters, as well as any conditions placed on individual grant awards.

To help ensure privacy and confidentiality, it is best practice to minimize notes. Additionally, advocates should be prepared to explain their limits of confidentiality and how the information disclosed during the intake process will be used. The purpose of this guide is to help facilitate a conversation and establish a trusting, respectful relationship. All answers do not need to be documented and retained in a file.

Remember: be transparent about how any funder-specific information will be used and why it is asked.

Before You Start

Before getting started, consider asking the survivor if there is anything you can do to make the survivor more comfortable in this space. This may include asking about lighting, seating, keeping the windows or doors open or closed, or whether they would like a snack or drink. Next, take a moment to explain the purpose of the intake meeting, who from the staff will be leading the meeting, your pronouns, and what you hope to accomplish.

For example, tell the participant you are hoping to hear from them about what their immediate concerns and needs are.

Remind them that your purpose is to serve as their housing advocate and that you are not here to judge them or make decisions for them. Remind them that they are free to share as much or as little as they feel comfortable with.

Remember: only ask for information that is necessary to help you learn how you can help them with housing stability.

Adapted from the National Network to End Domestic Violence Transitional Housing Intake Guide

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Suggested Questions

Consider taking steps to memorize these questions so that you are not reading from a piece of paper or computer screen when interacting with a survivor for the first time. In some instances, it may be beneficial to move right into the “safety” section.

General

What are your most pressing concerns today?

Health and Wellbeing

I am interested in understanding how this program can best serve you. Please include information you believe is relevant to your participation in this housing program. Who do you consider to be a support person in your life?

Safety

The program is committed to helping each survivor create a safety plan. The following questions will begin the conversation but safety planning should be ongoing during the survivor’s time in shelter or the housing program.

Let’s talk a little about your safety and any concerns you may have. This program is committed to helping you create a safety plan. We will be talking more in depth about safety planning, but let’s start with any immediate issues. Are there any immediate safety concerns that you have?

Is there anything else you would like to tell us regarding the safety concerns?

What do you need/what can I do to help you feel safe?

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Housing Needs

Explain the parameters of the program that the survivor would need to know before they meet with a case manager.

Do they have any critical needs or concerns related to housing? Do they have any pets or children, or do they need any accommodations while in the program that impact your housing needs? What has your housing experience looked like before?

Before You Close

Recapping the program, grounding a survivor's expectations about what you can and cannot provide, and offering next steps before the close of the meeting can help re-emphasize collaboration between you and the survivor. This is also a good time to provide survivors with any contact information, documents, or other information they may want to take with them.

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